TOWARDS A PRAGMATIC SYSTEM MIGRATION

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Outline

- My Alma migration journeys
- Alma – quick overview
- Migration process
- Communication during migration
- Training
My Alma migration journeys

- CUNY – migration from Aleph (for a consortium with 22 campuses)
- Brown – migration from Sierra
Alma – Quick Overview

- Library services platform
- Cloud based system
Library Services Platform

- Unifying management of print, electronic and digital content into a single platform
  - Incorporating previously separated functions (e.g., ERM, digital assets management system)
- Ability to handle multiple metadata models (e.g., MARC, DC, BibFrame, etc.)
- Supporting procurements of purchased, licensed and open access resources
- Robust reporting system for deep data analysis and visualization
- Integrated (or separate) discovery service platform
Cloud Based System

- Can access from any computer, anywhere with an internet access
- Deploy regular upgrades on the cloud (currently: quarterly)
- More open for third party integration
Migration Process
Migration Preparation (for Technical Services)

- Form a team of TS experts
  - Handling migration of legacy data
  - Managing transition of legacy practices
  - Local data to preserve or let go
- Utilize relevant migration documentation
  - Vendor’s documentation
  - Documentation from peer institutions
- Identify/plan pre-migration clean-up/tasks
  - Vendor’s documentation
  - Advice from peer institutions
Migration process

- Pre-migration
  - Data Extraction — what/how
    - Bib/Hol/Items/order/vendor/circ (records/data in records)
  - Data Mapping
  - Test load
    - Data review
    - Adjust data extraction/mapping strategies

- Production (Cutover) load
  - Data review
  - System configuration (done before/after migration)
Migration Process (cont’d)

- Post migration
  - System configuration – continuous
  - Workflow redesign
    - Learn/understand/make use of system features
    - Iterative process (learn, adjust and refine)
    - Opportunity to move towards a more efficient workflow
    - Consult (almost constantly) documentation, colleagues, peer institutions for best practices
  - Post migration clean up
    - Identify data to be cleaned – on-going
    - Develop strategies and set priorities
Communication

- **Who**
  - Identify audience
    - Technical Services staff
    - Library staff
    - Campus community

- **What**
  - Content
    - All library staff – high level migration progress and status
    - Technical services – detailed, more specific (e.g., data migration process, timeline)

- **How**
  - Email
  - Regular meetings
Examples

Communication with TS staff
IPS will be migrated to an item note in Alma (Internal Note 3). These items are considered “not available” after migration when process = Technical – Migration. (from ExLibris Knowledge Center)

- **Loan, On hold shelf, and On Order** inventory records have exact analogous statuses in Alma and those process statuses will migrate when related loans and orders link to them.

- Other status will have no equivalents in Alma and a TECHNICAL status is attributed to them so that they can be identified and managed in Alma.

- The only situation in which an item can receive ACQ status in Alma is when an item is a future serial with prediction and it is connected to an active order.
In Alma, for the migration programs to change physical resources into electronic resources, you have to identify/indicate which resources to change from physical to electronic (P2E).

At CUNY, ILS libraries and/or locations that represent electronic inventory are used to allow sub-identification (for cases where there is physical and electronic material linked to the same BIB) based on the BIB input file received.
In Sierra, checkin records become MARC holding records when they are migrated to Alma.
Brown - Item Barcodes

- Sierra allows item barcodes to be duplicates. Alma does not. The item barcode must be unique in Alma, but it may be left empty.
- The item barcode is migrated according to the following:
  - If the barcode is empty, it’ll migrate as empty.
  - If the barcode exists but is not unique:
    - First item barcode encountered – migrate as is.
    - Second and subsequent item barcodes encountered – migrate as
      \(<item\ barcode>-<item\ id>\) \((312xxxxxxxxxxx-ixxxxxxxx)\)
    - The final checkdigit of the Sierra item id (for example, i123459) are removed, so the migrated item id is i12345.
TS activities timeline and Alma Migration (June – August)

- Acquisitions/Cataloging activities
  - Ordering
    - From vendor ends May 28
    - Using pard ends June 15 (for rush only)
    - Fiscal close on June 28
    - July 5 – Aug. 17 - Rush orders only (data will be manually entered in Alma after Go Live)
  - Cataloging freeze June 25 (no cataloging activities until Go Live)
- Sierra data extraction/manipulation June 28 – July 26
- System technical (acq/cat) freeze – July 19 (Brown Alma not available until Go Live)
- Possible local training and practice – June 28 – August 13
- Go Live – August 17
Training
Training

- Realistic mindset – trainer and trainees
- Understand the learning process
  - Learning by doing
  - Visual
  - Sequential
- Develop a system
  - Instruction + hands on
  - Training for Day 1 tasks
  - Continuous training (e.g., weekly discussion, show and tell)
Trainer

- Allocate time to learn the new system
- Practice, practice, practice
- Identify Day 1 tasks and learning goals
- Prepare training materials
- Preferably with hands-on exercises
- Develop training logistics (dates/time, location, in-person or virtual)
Training

- Training for related configuration and preparation
  - E.g., exporting records (from OCLC), importing records (from Alma)
  - Record overlay – How
Becoming Alma Certified

- Why
  - Better understand Alma back-end features
  - Can better utilize system features
  - Can better control TS features (e.g., batch imports/export, batch jobs)

- How
  - View short videos in all Alma functions
  - Answer questions
  - Review videos/questions
  - Take virtual certificate exam
Thank You!

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